SAMHSA-HRSA
Center for Integrated Health Solutions

How an Individual Moves Through the Service System

From seeking care to Total Wellness Client:

The San Mateo County Experience

Shirley Chu, LCSW and Chris Esguerra, MD, MBA

San Mateo County Behavioral Health and Recovery Services

Cohort: III

Type of program: Embedded Care Coordination and Wellness Services

Primary care Model: FQHC co-located in Community Behavioral Health Clinics

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Our Client Background

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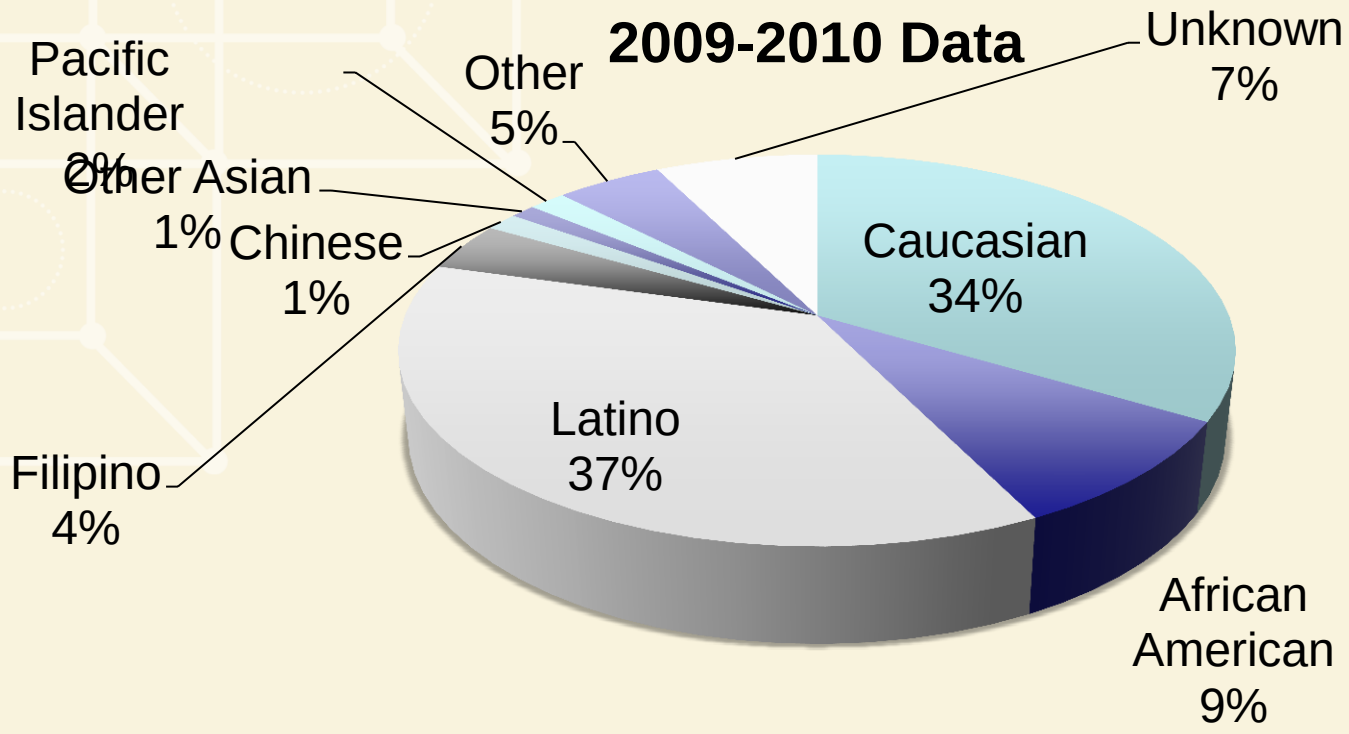
Demographics by Race/Ethnicity



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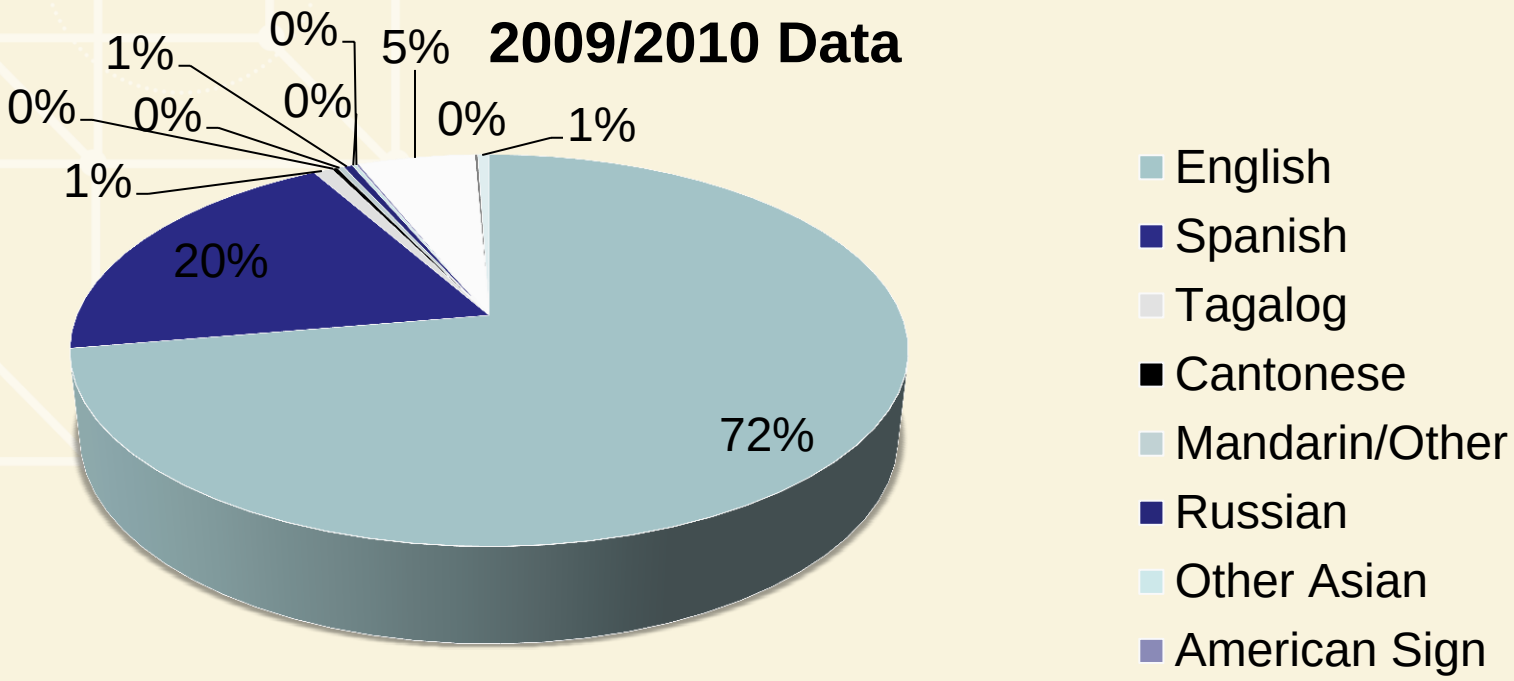
Demographics by Language



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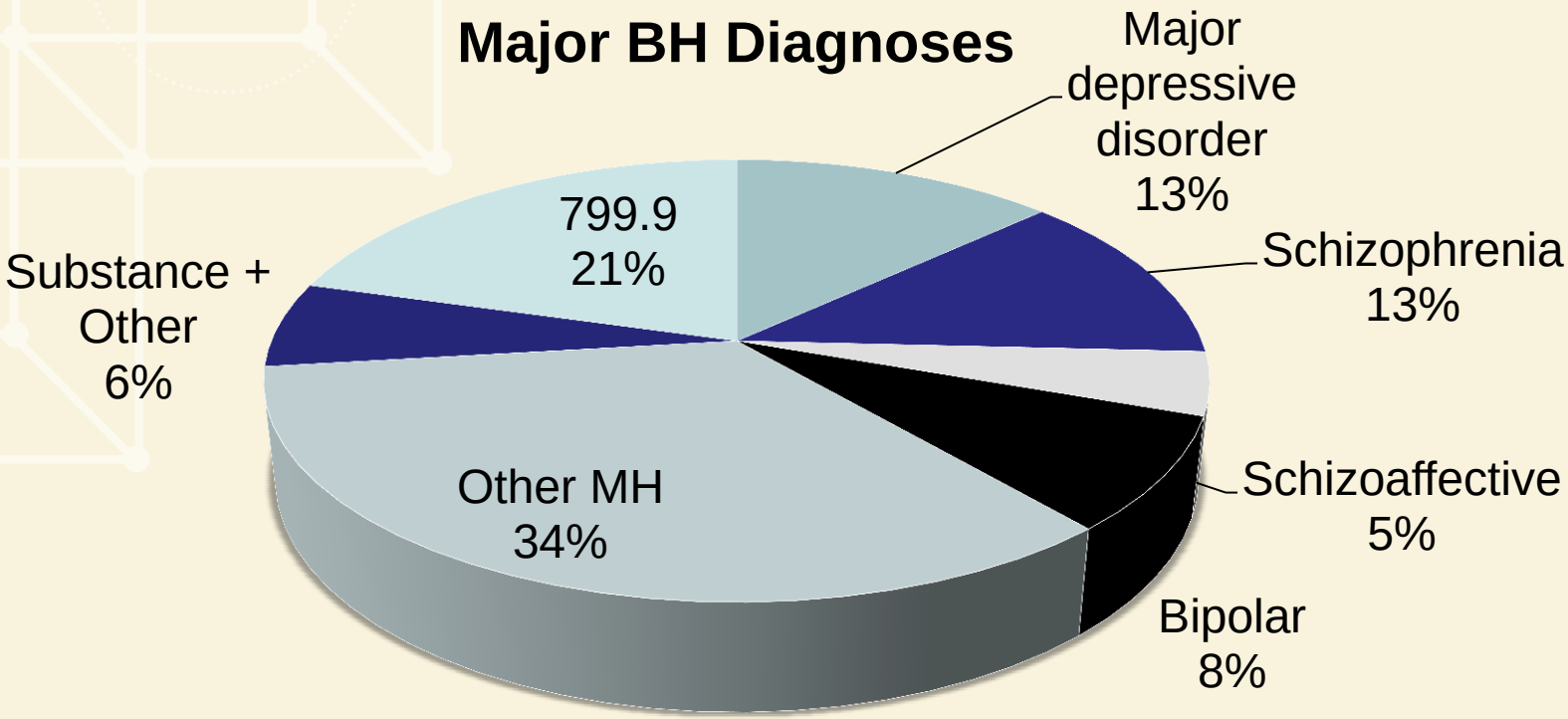
Behavioral Heath Profile



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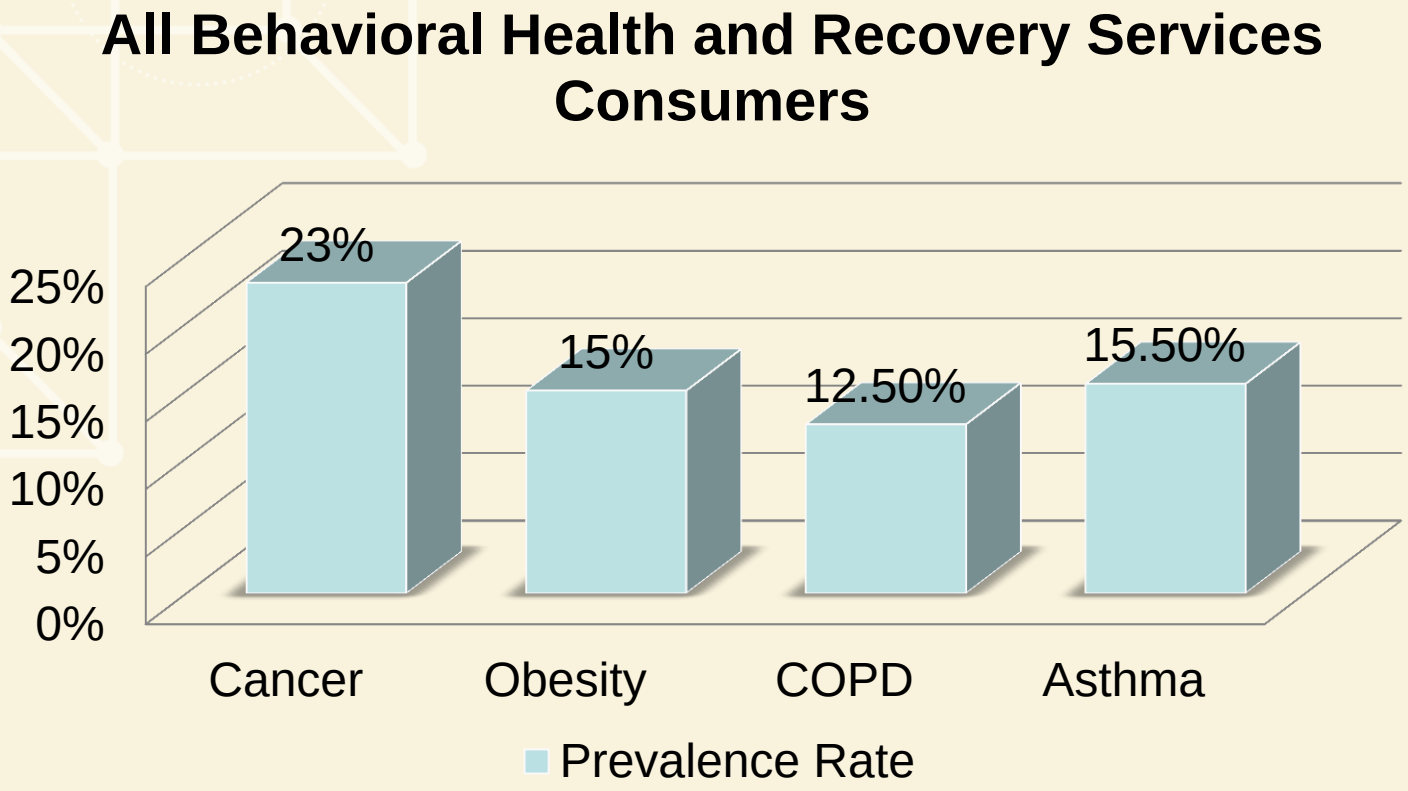
Physical Health Profile



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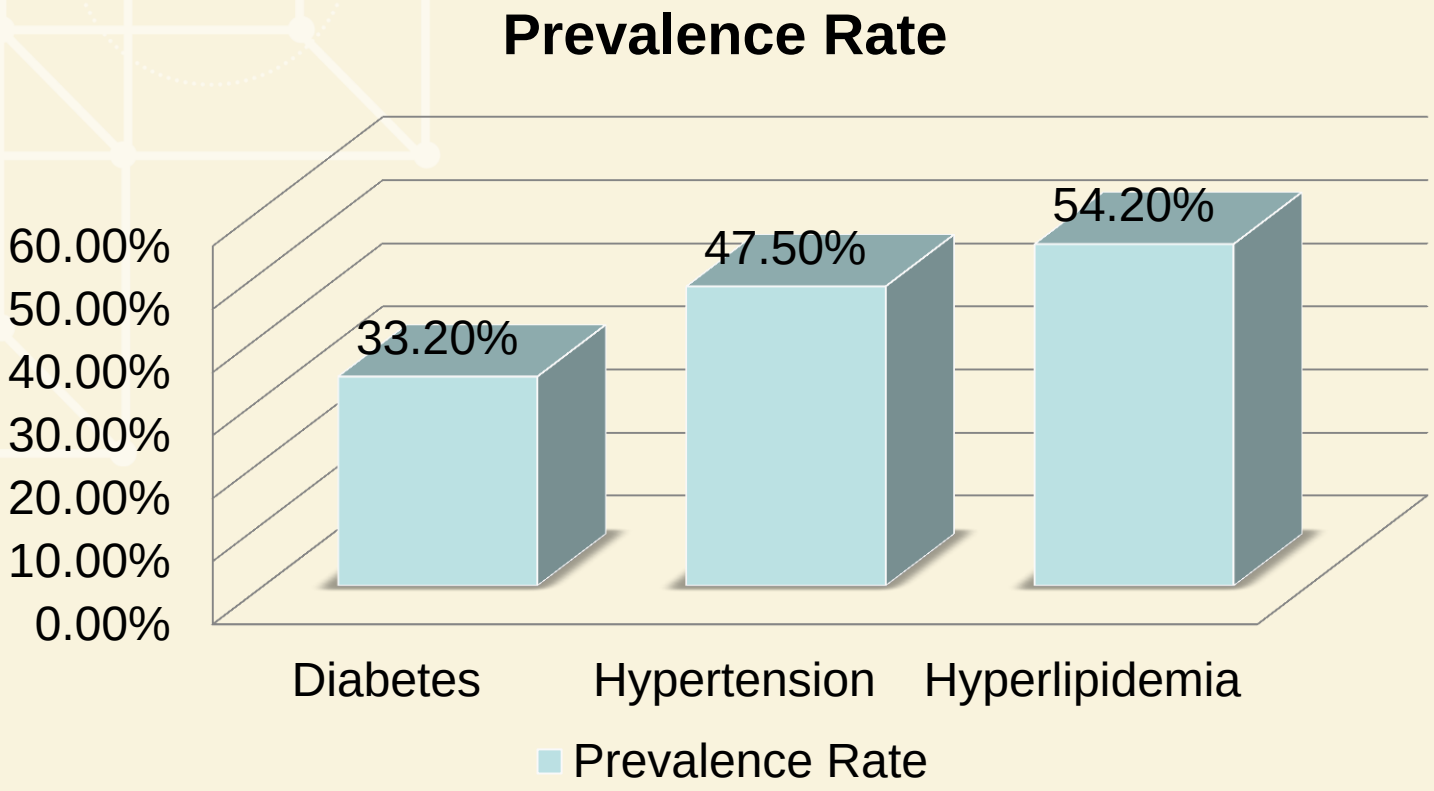
Physical Health Profile



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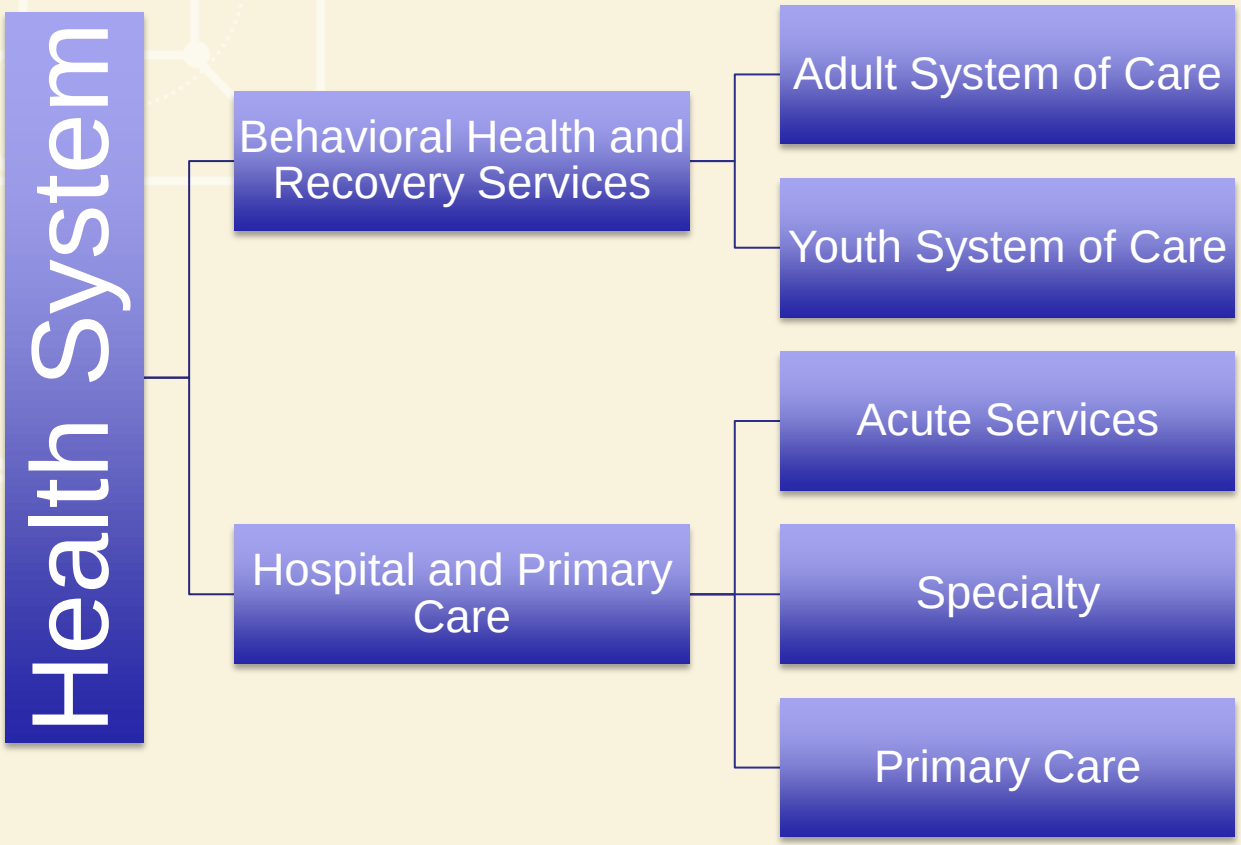
About San Mateo County's System



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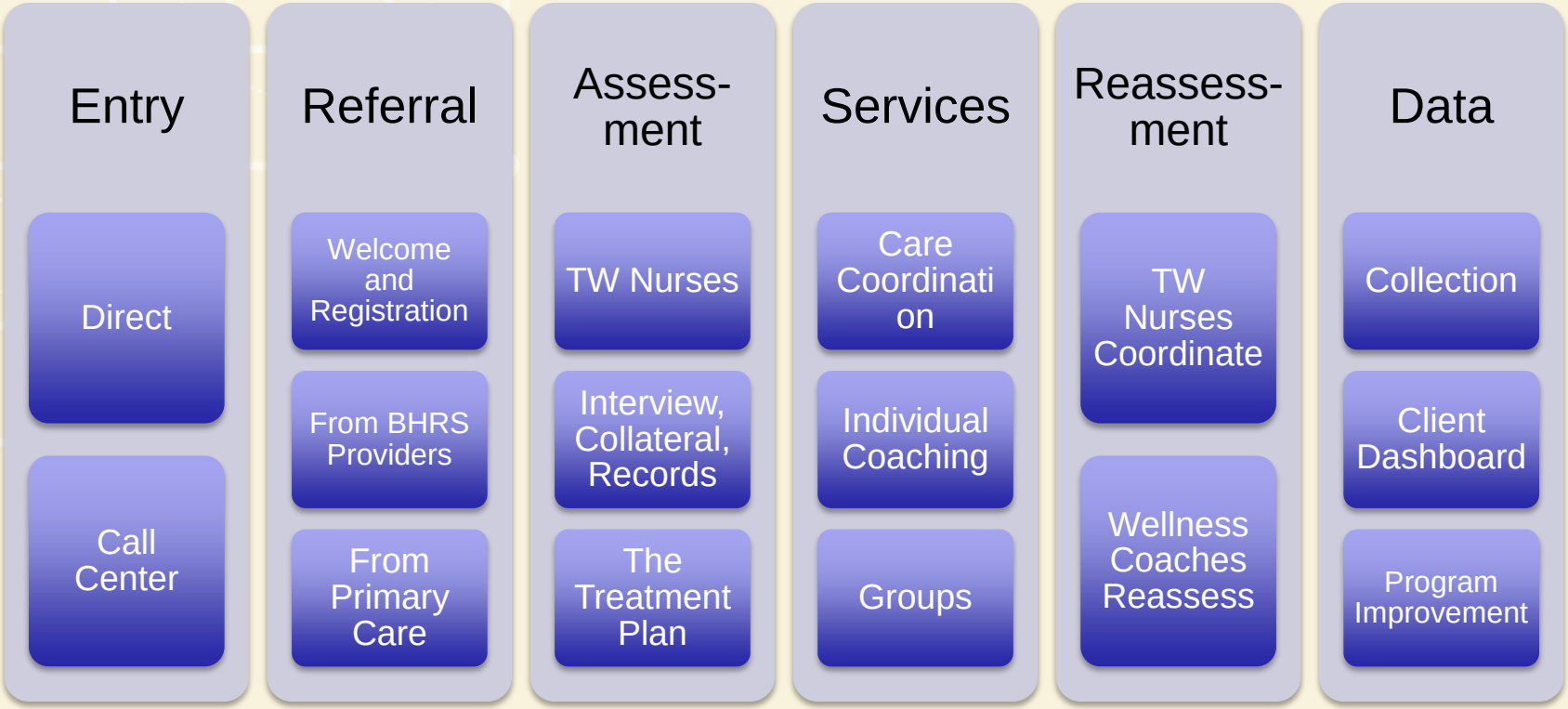
Process Stages



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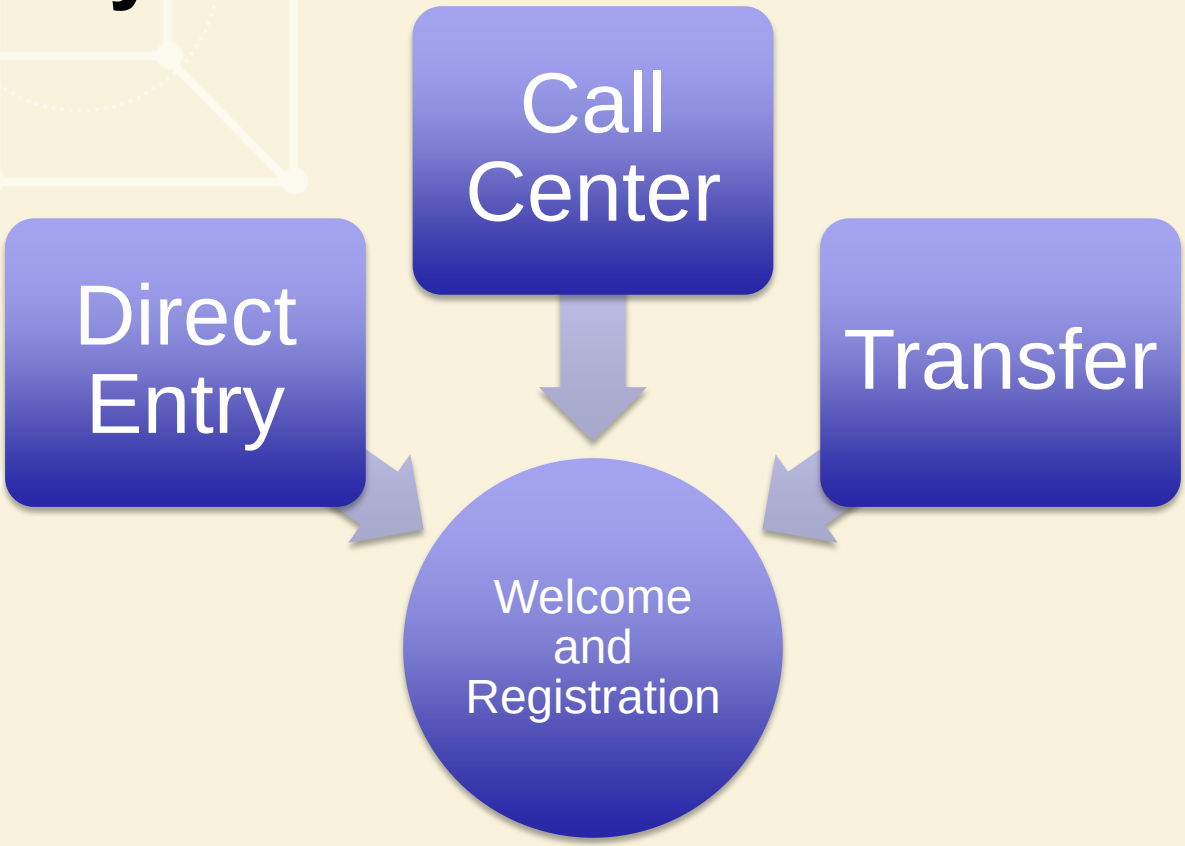
Entry into Behavioral Health and Recovery Services



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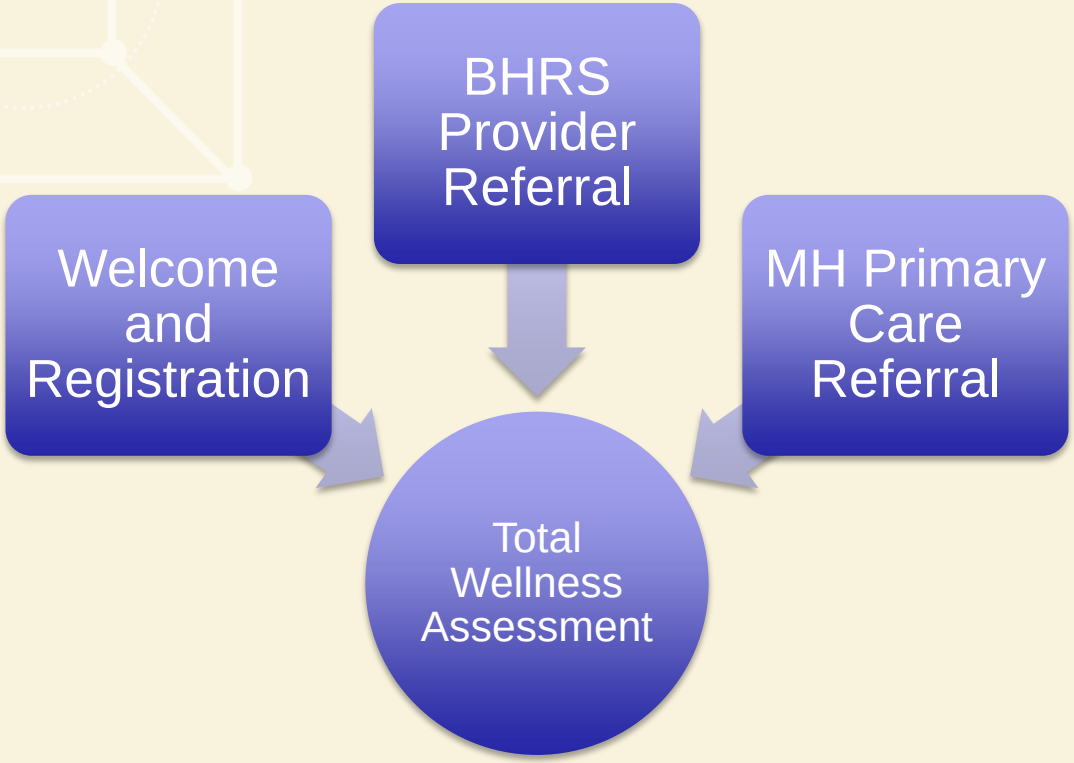
Referral to Total Wellness



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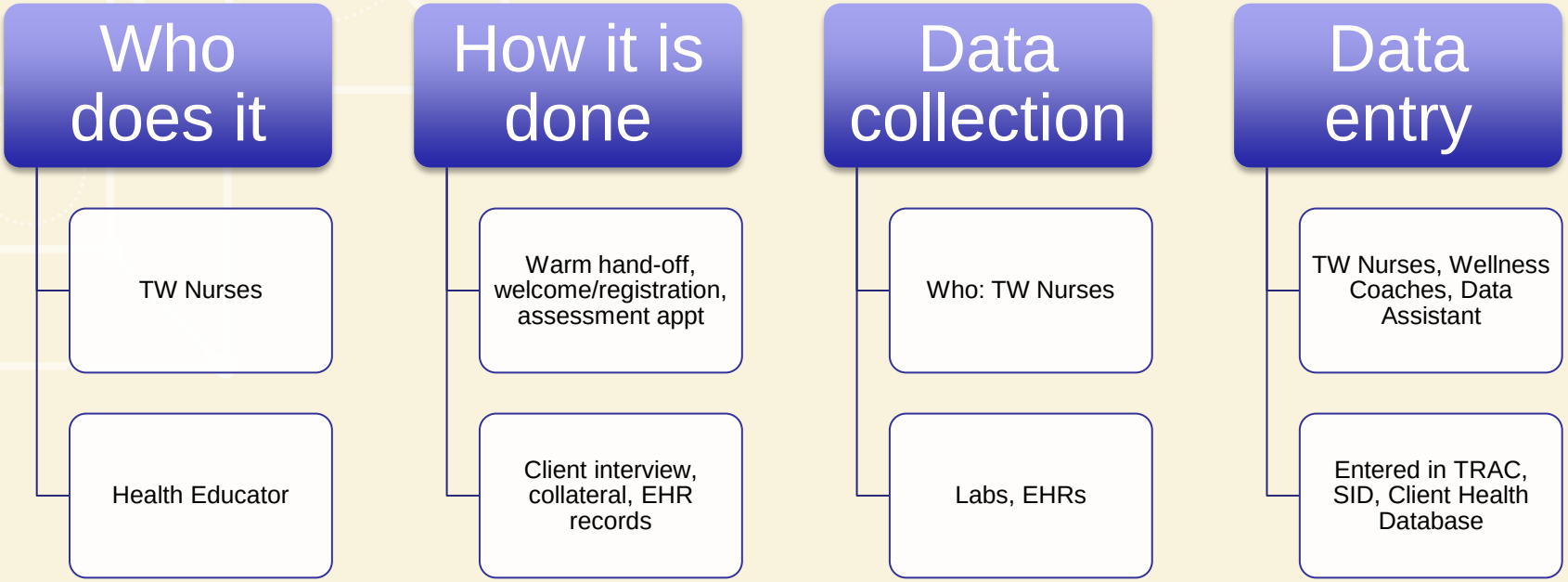
Assessment



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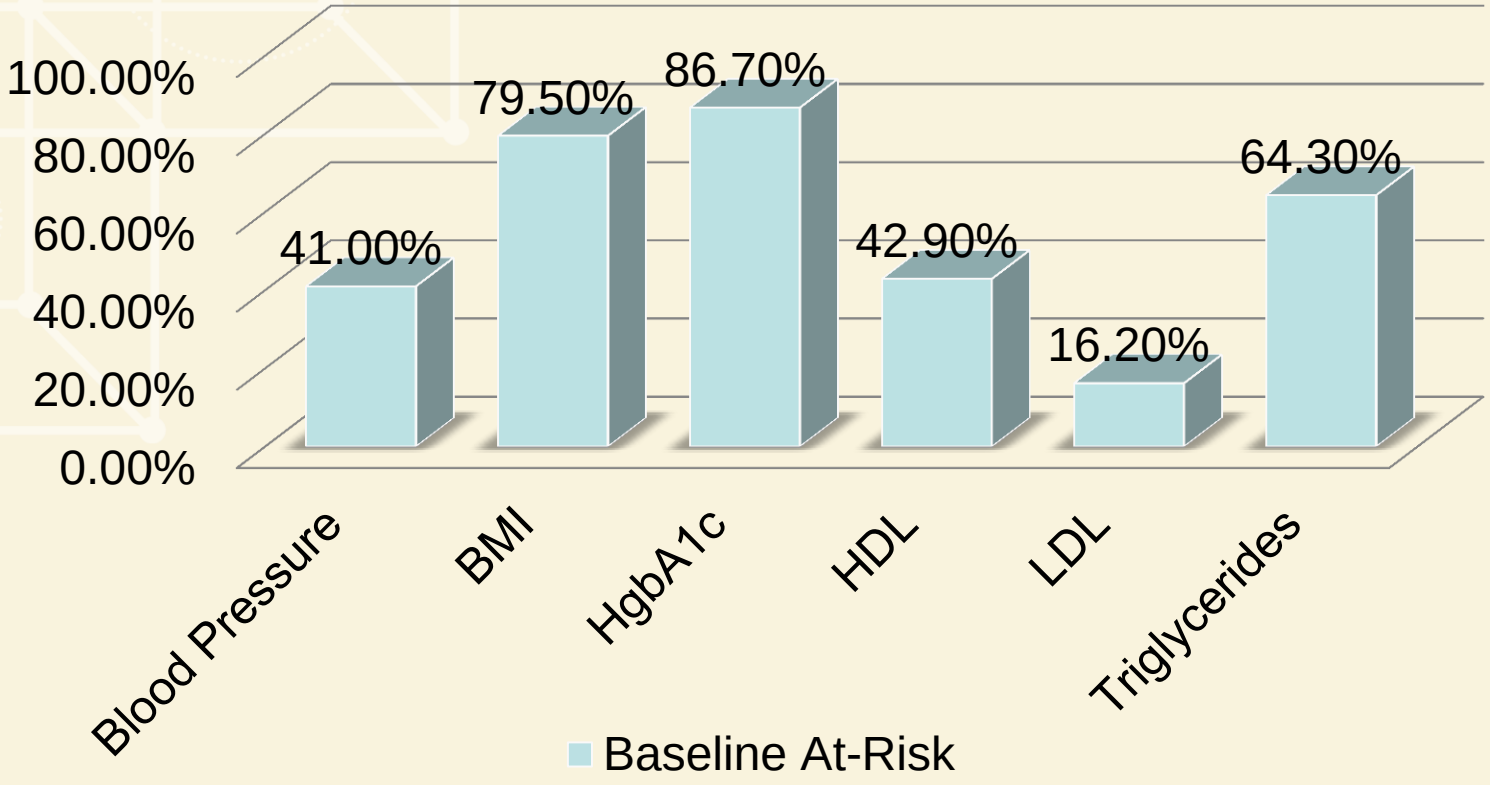
Our Clients' Baseline H Indicators



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The Treatment Plan

SAN MATEO COUNTY
BEHAVIORAL HEALTH & RECOVERY SERVICES

CLIENT TREATMENT & RECOVERY PLAN

410421 SOUTH CO. TOTAL WELLNESS PROGRAM

Client's Name

Plan Name: TW 2013 **Status:** Final
Plan Type: Annual **Admit Date:** 10/10/2012
Plan Start Date: 12/31/2012
Plan End Date: 12/31/2013 **TX Plan Unique ID:**

Client's Stated Goal: To prevent schizophrenia de-stabilization
Stabilize depression and it's functional impairments
To enjoy my life
"To learn how to quit smoking and not to go back"

BARRIER TO RECOVERY/SUCCESS: transporation issues, not taking medication

GOALS: More family involvement

OBJECTIVES: Client's next steps to achieving goal

Call family memberes on the phone -2-3x month
Talk to niece and make plan to visit-2 months

INTERVENTIONS: What Treatment Team will do

MH / CM Services

Medication Support: Yes

Duration: 12 Months **Status:** Current

BARRIER TO RECOVERY/SUCCESS: recurrent depressive symptoms

GOALS: Stabilize depression and its associated functional impairments

OBJECTIVES: Client's next steps to achieving goal

Keep appointments and continue taking medications
Keep working at friendship Center-6 months
Attend support groups 2 x week
Put in application for community friend at the friendship center-2 months
Meet with psychiatrist on a regular basis-3 months
Meet with C/M and learn 2 skills to tolerate stress and improve mood-6 months

INTERVENTIONS: What Treatment Team will do

MH / CM Services

Medication Support: Yes

Duration: 12 Months **Status:** Current

Electronically Signed By: JULIANA M. BURSTEN, RN,MS (REGISTERED NURSE AND MS IS PSY) on 1/18/2013
Electronically Co-signed by:

Print Date: 1/29/2013 **CONFIDENTIAL PATIENT INFORMATION** See California Welfare and Institutions Code Section 5328 **Page 1**

SAN MATEO COUNTY
BEHAVIORAL HEALTH & RECOVERY SERVICES

CLIENT TREATMENT & RECOVERY PLAN

410421 SOUTH CO. TOTAL WELLNESS PROGRAM

BARRIER TO RECOVERY/SUCCESS: Symptoms of depression, schizophrenia and tobacco dependence may interfere with health health self-management. others: living in a smoking household; limited transportation and finances. Elevated BMI and decreased ambulation due to arthritic pain and medication that may affect BMI contribute to decreased health maintenance.

GOALS: Reduce cigarettes to <8 per day, then
To stop smoking and maintain abstinence over the next 6-12 months

OBJECTIVES: Client's next steps to achieving goal

Attend Ash Thinkers Group 3-4 x/month
Obtain Peer Coaching for smoking reduction, as needed
Continue walking 4/10 of a mile 2x/week, when able
See Health Educator for 1:1 nutrition counseling r/t weight management, reduced fat/salt diet
Consider Nutrition group or Well Body Group for healthy diet weight management peer support
Reduce coffee intake to less than 2 cups per day and soda by 1/2, and substitute water

INTERVENTIONS: What Treatment Team will do

MH / CM Services care coordination, health education, peer support
T.B.S.Services

Medication Support: Yes

Duration: 12 Months **Status:** Current

Did Client Sign the Treatment Plan? **Was client offered a copy of the Plan?**
Comments: Client to review, sign, and be offered a copy of the plan when he returns to the clinic

Participants/Signatures:

	Client	**Date:**
ARREDONDO,VICTOR	Case Manager	
BURSTEN,JULIANA	Total Wellness Case Manager	
GABRIEL,ALYSE	Psychiatrist	
CHU,SHIRLEY	Other (BHRS Staff)	

Electronically Signed By: JULIANA M. BURSTEN, RN,MS (REGISTERED NURSE AND MS IS PSY) on 1/18/2013
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Services

Care Coordination

- facilitate flow of information
- develop coordinate and implement plan of care with tx team
- identify and address gaps

Individual Coaching

- peer and staff coaching on various health topics
- motivation enhancement
- wellness action plans

Groups

- smoking cessation groups (Ash Thinkers & Ash Kickers)
- Well Body (weight management)
- nutrition
- diabetes
- WRAP (wellness recovery action plan)
- health class

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Reassessment

Who does it

- Coordinated by TW nurses
- Conducted by wellness coaches

Monitoring

- Weekly team meeting
- Informal huddles and check-ins
- Lab data review and report

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Data

Collection	• EHRs • Labs
Helping Clients	• Clinical Team Meetings • The Dashboard (next slide)
Program Improvement	• Smoking Cessation • Nutrition and Physical Activity

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The Client Dashboard

My Total Wellness Individual Health Report

My Name: john doe — Baseline Date: 2/15/11

My Recovery Team		My Diagnoses (Please write in)	
Nurse Care Manager:		Medical	Psychiatric
Primary Care Provider:			
Psychiatrist:			
Case Manager:			

Key: Normal | Caution | At Risk

My Recovery Progress on Select Health Indicators

	Baseline	6 month	12 month	18 month	24 month	30 month
Conducted Date	2/15/11	7/22/11	2/16/12	7/19/12		
Blood Collected Date	3/3/11	5/19/11	12/15/11	6/20/12		

Category	Indicator (Goal)	Baseline	6 month	12 month	18 month	24 month	30 month
Lungs	Smoking? (No)	20	20	15	20	#N/A	#N/A
Weight	BMI (18.5 to 24.9)	41.7	39.8	39.5	38.8	#N/A	#N/A
	Weight	132.0	126.0	125.0	123.0	#N/A	#N/A
Blood Pressure	Systolic BP (90-120)	150	125	100	126	#N/A	#N/A
	Diastolic BP (60-80)	88	88	77	80	#N/A	#N/A
Blood Sugar	Fasting Glucose (70-99)	91	87	98	90	#N/A	#N/A
	Hemoglobin A1c (4.0-5.6)	5	#N/A	#N/A	5.1	#N/A	#N/A
Heart Health	Total Cholesterol (125-200)	258	243	185	139	#N/A	#N/A
	LDL (20-129)	157	128	110	76	#N/A	#N/A
	HDL (≥40)	34	38	43	33	#N/A	#N/A
	Triglycerides (30-149)	297	375	201	169	#N/A	#N/A

My Wellness Goals:	My Action Plan:
I will	I will
I will	I will
I will	I will

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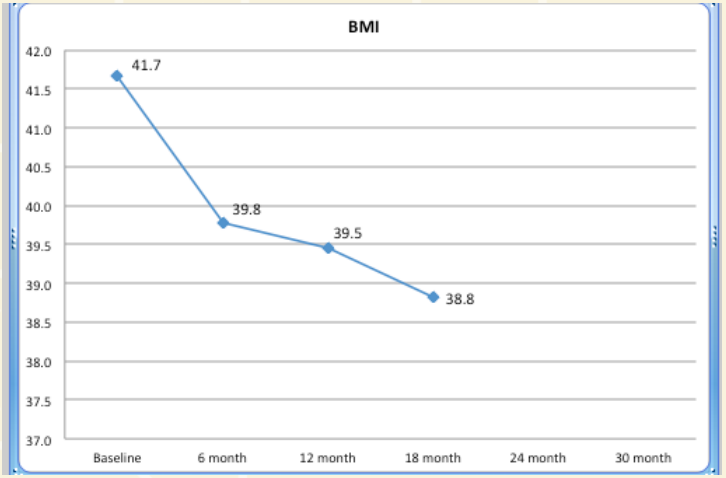
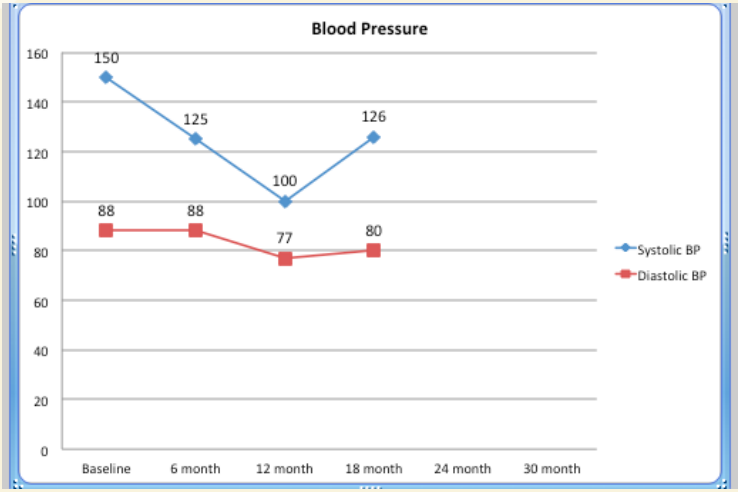
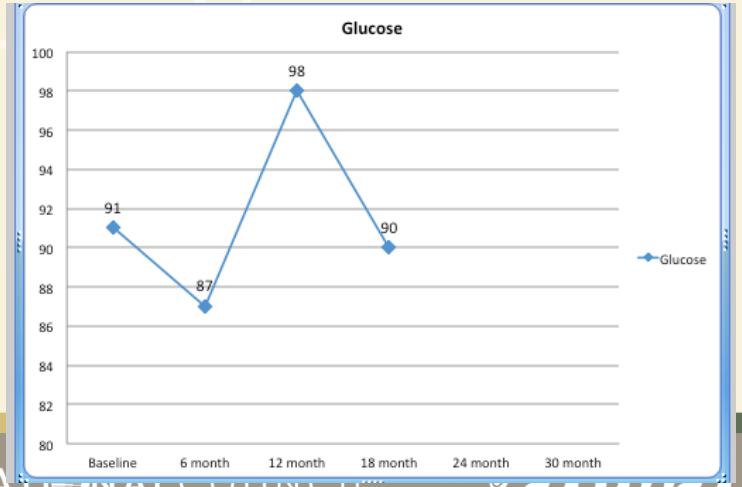
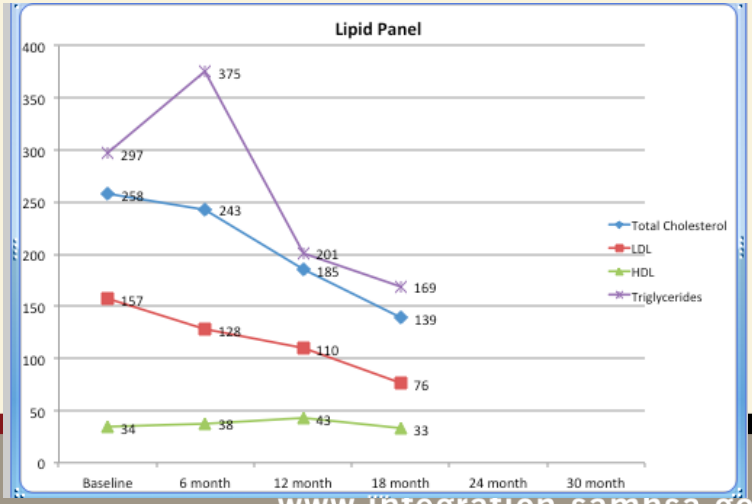
Sample Client Graphs









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Influencing Policy and the Greater System

- Smoking Cessation
- Care Coordination
- Peers
- Greater attention to physical health
- Duals Demonstration

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Shirley Chu, LCSW
Unit Chief for Total Wellness

Chris Esguerra, MD, MBA
Project Director and Deputy Medical Director

THANK YOU!